Chapter 3

Navigating the Modern DCPDS

Chapter Overview

Introduction   This chapter explains the basics of how to move around in (or "navigate") the modern DCPDS to perform your work, including common windows terminology and the menus and tools you will see displayed on the modern DCPDS windows.

Chapter Contents

Chapter Overview, Continued

Chapter Contents (continued)

Windows Terminology

Purpose
The modern DCPDS is a "windows" application. This section describes and defines the windows terminology.

Illustration
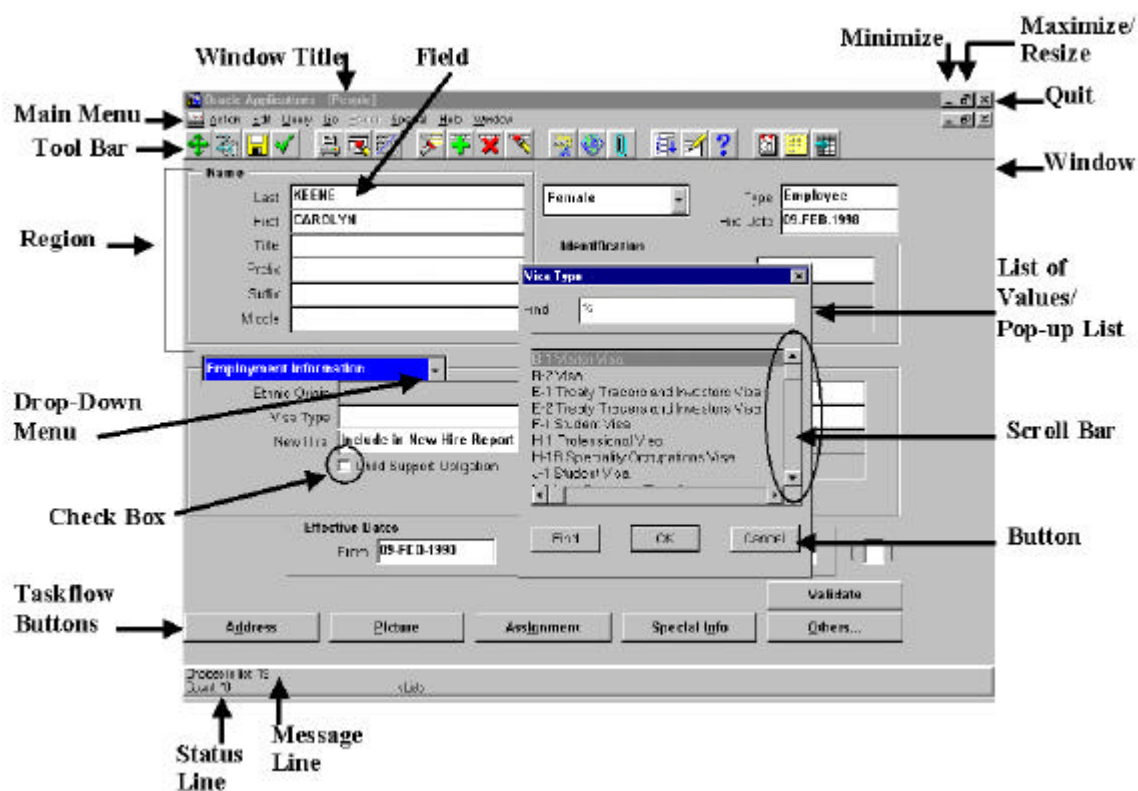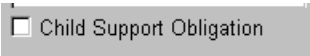
Terms
Below is a list of basic windows terms and their definitions.

Term	Definition
Application	A computer software program. The modern DCPDS is an *application*. Another example of an *application* is *Microsoft Word for Windows*.

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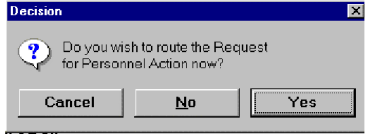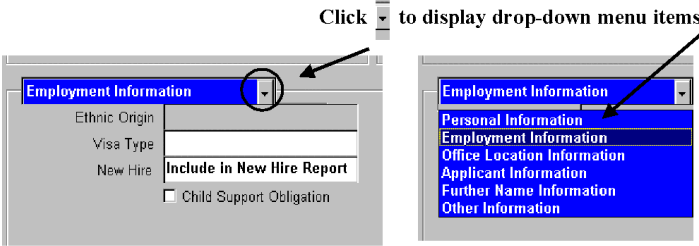
Windows Terminology, Continued

Terms (continued)

Term	Definition
Button	A graphic element that initiates a predefined action when you choose it. In the examples below, the *button* with the picture of a diskette on it initiates the "save" function. ¨ **Examples:**
Check Box	A box in which you can toggle between an "on/off" or "yes/no" state for a value. ¨ **Example:**
Clipboard	A temporary storage area that holds objects (e.g., data) that you "cut" or "copy" (see *Main Menu Bar, Edit Menu* in this User Guide for more information about the cut and copy functions in the modern DCPDS).
Current Record Indicator	Multi-record blocks often display a *current record indicator* to the left of each record. A *current record indicator*, when filled in, identifies a record as being the current or "active" record. ¨ **Example:**
Desktop	The screen background on your computer monitor, where you view and access all information.

Windows Terminology, Continued

Terms (continued)

Term	Definition
Dialog Box	A window that requires you to act on its contents before continuing. ¨ **Example:**
Drop-Down Menu	A list of options "drops down" when the drop-down button is clicked. ¨ **Example:**
Field	Also referred to as a "data field." An area in a window that displays data or allows you to enter data. ¨ **Example:**
Flexfield	A data field that is made up of sub-fields, or segments. That is, a flexfield contains a number of data fields (or separate pieces of data) within itself. In contrast, regular information fields hold just one unit of information. (See the section on *Flexfields* in this User Guide for more information).

Windows Terminology, Continued

Terms (continued)
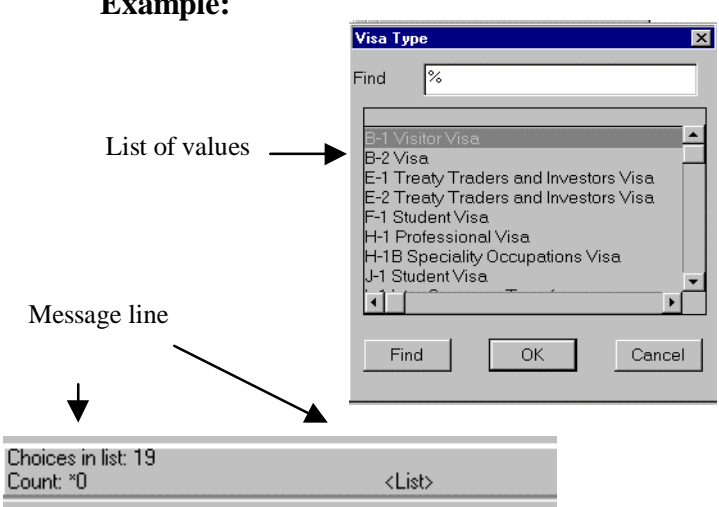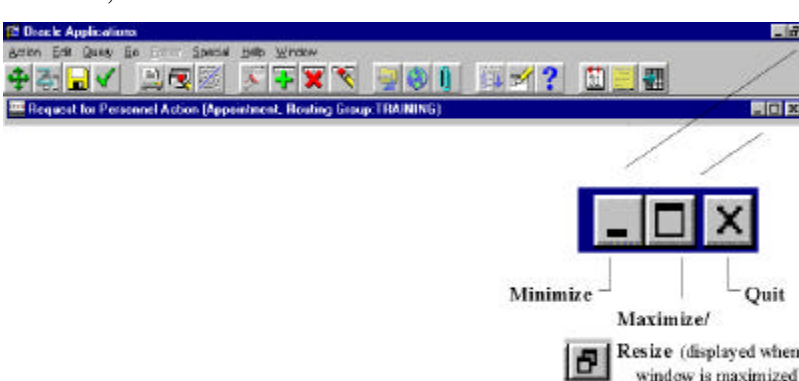
Term	Definition
Form	An organized display of data fields through which you can access and enter information to complete a business task. When you use the **Navigation List** on the **Navigator** Window, you navigate to a form. ¨ **Examples of forms:** • "Request for Personnel Action – Appointment" • "Civilian Inbox" • "Position" Each form displays one or more windows that links to a complete business or task flow. A given window can appear in more than one form if it accomplishes a task that is part of more than one business or task flow. A form in one responsibility may vary from the same form in another responsibility, in that certain windows or buttons may exist in one but not the other. What you see depends upon your responsibility, or access rights.
Icons	Small pictures that represent various applications, files, folders, or commands. ¨ **Example:** Minimized window icon

Windows Terminology, Continued
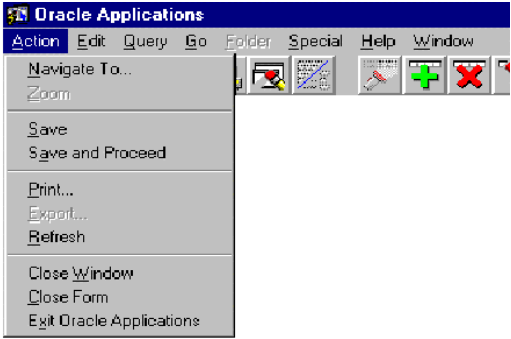
Terms (continued)

Term	Definition
List of Values (LOV)	A List of Values (LOV) (possible data choices) for the current data field. LOVs are available for most data fields. If a list is available, **<List>** will appear on the message line at the bottom of the window. ¨ **Example:** List of values ——▶ Message line
Maximize	Enlarges a window to fill the entire desktop. To maximize a window, click the maximize button at the top right corner of the window. To restore the window to its previous size and location, click the Resize icon.

Windows Terminology, Continued

Terms (continued)
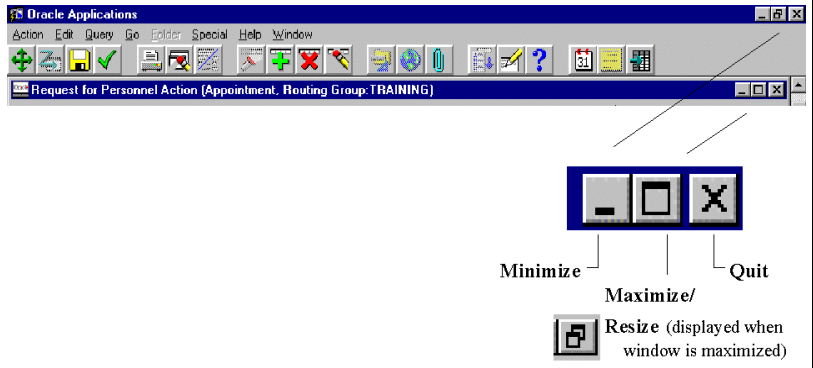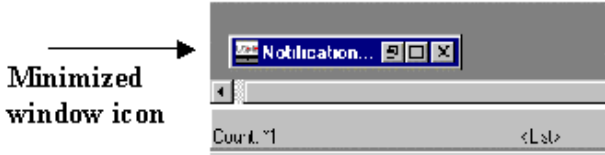
Term	Definition
Menu	A list ("menu") of choices used to perform a variety of functions. The Main Menu Bar provides menus for functions needed throughout the modern DCPDS (for example, to save an action or do a query). The Main Menu Bar is always in view and accessible; it is located at the top of every window. There are also "drop-down menus" that appear throughout the system, organized around specific forms, data, or functions. ¨ **Example:** Action Menu ⟶ (accessed by clicking Action on Main Menu Bar)
Message Line	A line of text that is displayed near the bottom of your window and displays hints, warnings, or error information. ¨ **Example:** Message Line ⟶ Enter a query; press F8 to execute, Ctrl+q to cancel. Status Line ⟶ Count: *0 ENTER QUERY

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Windows Terminology, Continued
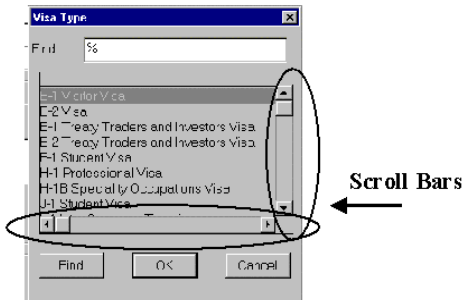
Terms (continued)

Term	Definition
Minimize	Shrinks a window to an icon on the desktop or to a button on the taskbar. Minimizing a window keeps it active and easily available for your use, but gets it out of your way as you work with one or more other windows. To minimize a window, click the minimize button at the top right corner of the window. To open a minimized window, click the icon created when you minimized the window.
Navigate	Term used to describe the way users move around in the modern DCPDS; e.g., move from one place in the application (form, window, data field, etc.) to another. Users can navigate through the system by using the mouse or keyboard.
Resize	Restores a window to its previous size and location. See **Maximize**.

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Windows Terminology, Continued
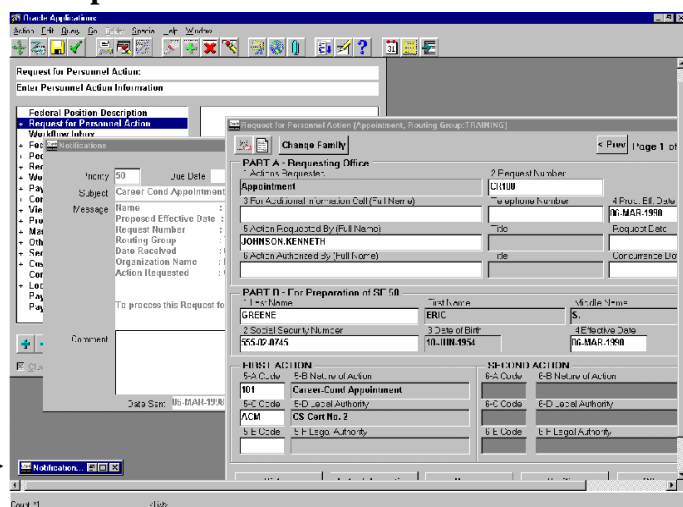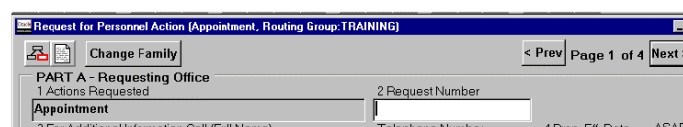
Terms (continued)

Term	Definition
Scroll Bar	The shaded bars located along a side and/or bottom of a window when the size of the window contents (document, List of Values, inbox, form, etc.) exceeds the space of the window. To scroll to another part of the item (you have open and are working with document, List of Values, inbox, form, etc.), click and drag the box or click the arrows in the scroll bar. ¨ **Example:**
Status Line	A line displaying status information about the current window or data field, such as query-mode and record-count information. ¨ **Example:**
Taskflow	A sequence of windows linked by buttons to take you through the steps necessary to complete a task, such as hiring a new employee.
Taskflow Buttons	Buttons that take you to a series of additional windows to access additional data fields necessary to complete a task, such as hiring a new employee. ¨ **Example:**

Windows Terminology, Continued

Terms (continued)

Term	Definition
Window	An area where the user interacts with an application. Many windows can be open at the same time, overlapping or adjacent to each other. ¨ **Example:** Minimized window icon → Multiple windows open concurrently with one minimized.
Window Title	Text in the Title Bar that indicates the name of the window and, usually, context information pertinent to the information in the window. ¨ **Example:** Window Title →

Main Menu Bar

Purpose

The Main Menu Bar (located at the top of modern DCPDS windows) is used to perform a variety of functions necessary to complete a task in the modern DCPDS. It contains eight pull-down menus that enable you to perform various other actions in the system:

- **Action**
- **Edit**
- **Query**
- **Go**
- **Folder**
- **Special**
- **Help**
- **Window**

By clicking any of these menus, a drop-down menu of choices will appear.

Examples of menu bar functions include: saving pending changes, retrieving information, and printing a report or form (to name just a few).

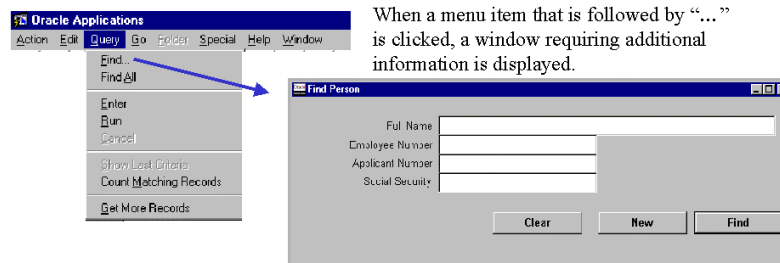**Illustration**

Items followed by "…"

Items listed in the pull-down menus that are followed by "**…**" (e.g., "Find…" in the Find menu) will, when clicked, display a window that requires some additional action on your part before performing the desired function.
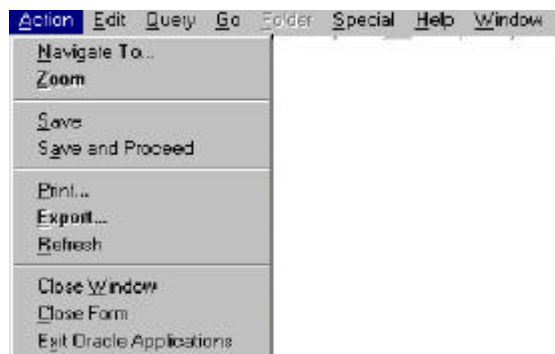
◆ **Example**:

Menu Functions

Information about each of the Main Menu Bar menus and their associated functions follows.

Main Menu Bar: <u>A</u>ction Menu

<u>**Action Menu**</u>   The <u>**Action**</u> menu is used to perform a variety of general functions.

To access the <u>A</u>ction menu:

- Click <u>**Action**</u> on the Main Menu Bar.

  OR

- Use keyboard shortcut **[Alt] + a**.

<u>**Action Menu**</u>
<u>**Items**</u>

Below are the items listed in the <u>**Action**</u> menu and the functions you can perform with them. Included for many is a button and/or keyboard shortcut you can use to perform the same function without using the menu.

Click…	To…	Button	Shortcut
<u>**N**</u>**avigate To…**	Display the **Navigator** Window.		
<u>**Z**</u>**oom**	This function is not available.		
<u>**S**</u>**ave**	Save any pending changes to the current form or record.		[F10]
S<u>**a**</u>**ve and Proceed**	Save pending changes and return the form to a state where the next transaction can be started.		
<u>**P**</u>**rint…**	Print the current window or report.		
<u>**E**</u>**xport…**	Export (copy) data to another document outside the modern DCPDS (e.g., to a spreadsheet).		
<u>**R**</u>**efresh**	Re-display the window to correct imaging problems (see *Refreshing a Window)*.		
Close Form	Close all windows in the current form.		
Close <u>**W**</u>**indow**	Close the current window.		[Ctrl] + [F4]
E<u>**x**</u>**it Oracle Applications**	Exit out of the modern DCPDS.		[Ctrl] + q

Main Menu Bar: Edit Menu

Edit Menu   The **Edit** menu is used to edit the data in the modern DCPDS.

To access the Edit menu:

- Click **Edit** on the Main Menu Bar.
  OR
- Use keyboard shortcut **[Alt] + e**.

Edit Menu Items

Below are the items listed in the **Edit** menu and the actions you can perform with them. Included for many is a button and/or keyboard shortcut you can use to perform the same function without using the menu.

Click…	To…	Button	Shortcut
Cut	Cut the current selection to the clipboard. The item may then be "pasted" to another data field. Use this when you want to **move** data from one data field to another.		[Ctrl] + x
	Caution: Clipboard contents will be replaced with the next "cut" or "copy" action. To avoid losing clipboard contents, "paste" it to the desired location before you "cut" or "copy" other data.		

Main Menu Bar: Edit Menu, Continued

Edit Menu Items (continued)

Click…	To…	Button	Shortcut
Copy	Copy the current selection to the clipboard. The item may then be "pasted" to another data field. Use this when you want to **copy** data from one data field to another. **Caution:** Clipboard contents will be replaced with the next "cut" or "copy" action. To avoid losing clipboard contents, "paste" it to the desired location before you "cut" or "copy" other data.		[Ctrl] + c
Paste	Place the contents of the clipboard into the current data field. This function follows a copy or cut action.		[Ctrl] + v
Clear Field	Erase the data from the current field.		[Ctrl] + u
Duplicate Field Above	Copy the value from the prior field.		[F3]
List of Values…	Display the List of Values (possible data choices) for the current data field. See *Using a List of Values* for additional information. **Note:** Lists of Values are not available for all data fields. If a list is available, **<List>** appears on the message line at the bottom of the window.	🔢	[F9]
Edit Field…	Displays the **Editor** Window for the current data field. See *Editing a Field Using the Editor Window* in this module for additional information.		[Ctrl] + e
New Record	Insert a new, blank record. See *Creating Records* for additional information.	➕	[F6]

Main Menu Bar: **E**dit Menu, Continued

Edit Menu Items (continued)

| Click…	To…	Button	Shortcut
Delete Record	Delete the current record from the database. See *Deleting Records* for additional information.		[Shift] + [F6]
Clear **R**ecord	Clear all data pertaining to the current record in the window.		[Shift] + [F4]
Duplicate Record Above	Copy all values from the prior record to the current record.		[F4]
Attac**h**ments…	Display the **Attachments** Window. If the bottom half of the button is highlighted, a document is attached.		
Select **A**ll	Select all records (for blocks with multiselect).		
Dese**l**ect All	Deselects all selected records except for the current record (for blocks with multiselect).		
Clear **B**lock	Clear all records from the current block.		[Shift] + [F5]
Clear For**m**	Clear any pending data from the current form. If the data is new and has never been saved to the database, it will be lost.		[Shift] + [F7]

See Also
👓

Module 1, Fundamentals of the Modern DCPDS
>   Chapter 5, Updating and Viewing the Employee Record
>   Chapter 3, Navigating the Modern DCPDS,
>   >   Attaching a Document

Main Menu Bar: Query Menu

Query Menu   The **Query** menu is used to retrieve records.
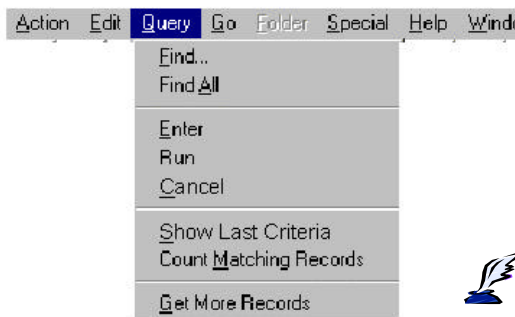
To access the Query menu:

- Click **Query** on the Main Menu Bar.

  OR

- Use keyboard shortcut **[Alt] + q**.

NOTE: To cancel a **Query** after entering the query criteria, press **[Ctrl] + q**.

Query Menu Items   Below are the items listed in the **Query** menu and the actions you can perform with them. Included for some of the menu selections are keyboard shortcuts you can use to perform the same function without using the menu.

| Click…	To…	Shortcut
Find…	Display the **Find** Window to retrieve records.	
Find All	Retrieve all records.	
Enter	Invoke the Enter Query mode to enter search criteria for a Query-by-Example search.	[F7]
Run	Execute a Query-by-Example search.	[F8]
Cancel	Cancel the Query-by-Example search by exiting from the Enter Query mode.	
Show Last Criteria	Recover the search criteria used in the previous Query-by-Example search.	
Count Matching Records	Count the number of records that would be retrieved if you ran the current Query-by-Example search.	[Shift] + [F2]
Get More Records	Display the next set of records retrieved from the current Query-by-Example search.	

See Also   Module 1, Fundamental of the modern DCPDS
            Chapter 6 – Retrieving Records

Main Menu Bar: G͟o Menu

G͟o Menu   The **G͟o** menu is used to navigate between data fields, records, and blocks.
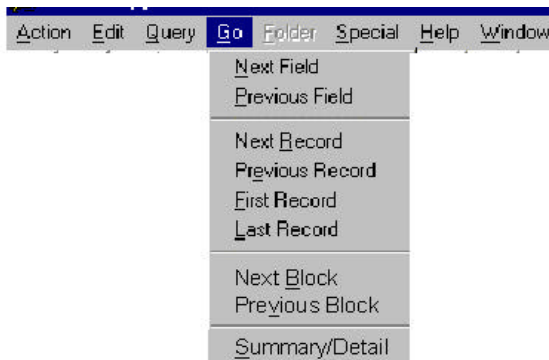
To access the G͟o menu:

- Click **G͟o** on the Main Menu Bar.
  OR
- Use keyboard shortcut **[Alt] + g**.

G͟o Menu Items   Below are the items listed in the **G͟o** menu and the actions you can perform with them. Included for many is a keyboard shortcut you can use to perform the same function without using the menu.

Click…	To…	Shortcut
N͟ext Field	Move the cursor to the next data field.	[Tab]
P͟revious Field	Move the cursor to the previous data field.	[Shift] + [Tab]
Next R͟ecord	Move the cursor to the next record.	[Page Down]
Pre͟vious Record	Move the cursor to the previous record.	[Page Up]
F͟irst Record	Move the cursor to the first record.	
L͟ast Record	Move the cursor to the last record.	
Next B͟lock	Move the cursor to the next block.	[Ctrl] + [Page Down]
Pre͟vious Block	Move the cursor to the previous block.	[Ctrl] + [Page Up]
S͟ummary/ Detail	Switch between the summary and detail views of a combination block.	

See Also   Module 1, Fundamentals of modern DCPDS
6̆6̆   Chapter 6 – Retrieving Records

Main Menu Bar: Folder Menu

Folder Menu   The **Folder** menu lets you customize the presentation of data in a folder and manage folder definitions.
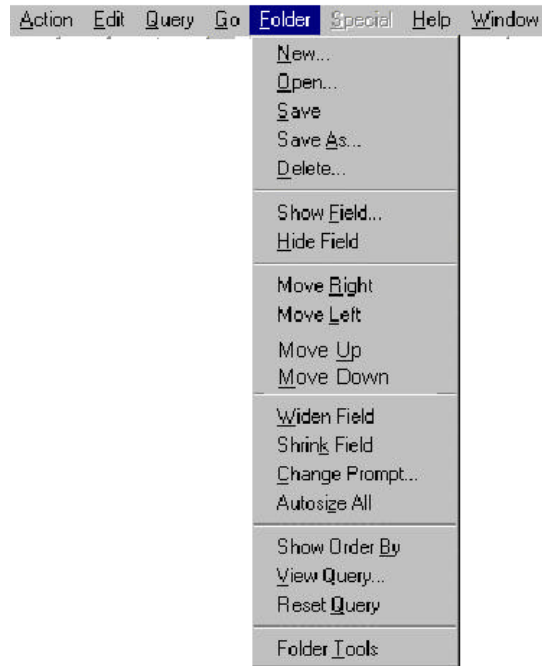
To access the Folder menu:

- Click **Folder** on the Main Menu Bar.

  OR

- Use keyboard shortcut **[Alt]** + **f**.

Folder Tool Palette   For many of the **Folder** menu items there are corresponding buttons which perform the same functions.

To access the folder buttons:

- Click the **Folder Tools** button on the Toolbar, which becomes enabled when you navigate to a folder block.

    The **Folder Tool Palette** displays:

Main Menu Bar: Folder Menu, Continued

Folder Menu Items
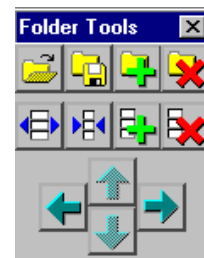
Below are the items listed in the **Folder** menu and the actions you can perform with them. Included for many is a button from the **Folder Tool Palette** that you can use to perform the same function without using the menu.

Click…	To…	Button
New…	Create a new folder definition.	
Open…	Open a saved folder definition.	
Save	Save current folder definition.	
Save As…	Save current folder definition to a new one with a new name.	
Delete…	Delete an existing folder definition.	
Show Field	Show the current data field.	
Hide Field	Hide the current data field.	
Move Right	Move the current data field to the right.	
Move Left	Move the current data field to the left.	
Move Up	Move the current data field up.	
Move Down	Move the current data field down.	
Widen Field	Increase the width of the current data field.	
Shrink Field	Decrease the width of the current data field.	
Change Prompt…	Change the prompt for the current data field.	

Main Menu Bar: Folder Menu, Continued

<u>F</u>older Menu Items (continued)

Click…	To…	Button
Auto<u>s</u>ize All… ⚠️	Adjust all data field widths to completely show their data. **Caution:** This cannot be undone without resizing each window.	
Show Order <u>B</u>y	Toggle the display of the Order By buttons so you can specify the sort order for the first three data fields.	
<u>V</u>iew Query…	Display the query criteria for the current folder definition.	
Reset <u>Q</u>uery	Erase the current query criteria.	
Folder <u>T</u>ools	Display the folder tool palette.	

See Also 👓

Module 1, Fundamentals of the modern DCPDS
     Chapter 7 - Folders

Main Menu Bar: Special Menu

Special Menu   The **Special** menu contains items relating to special functions of the modern DCPDS.

To access the Special menu:

- Click **Special** on the Main Menu Bar.
  OR

- Use keyboard shortcut **[Alt]** + **s**.
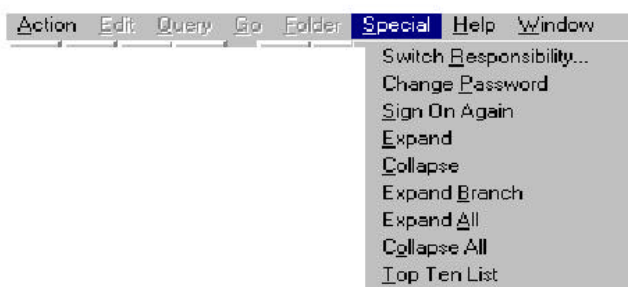
Special Menu Items   Items listed in the **Special** menu vary, depending upon what modern DCPDS Window you are in at a given time.   The functions that can be performed via the **Special** menu are explained in other parts of this User Guide, along with their associated topics.

August 25, 2000

Main Menu Bar: Help Menu

Help Menu The **Help** menu provides access to information on how to use the modern DCPDS, from help on a specific window to a library of information.
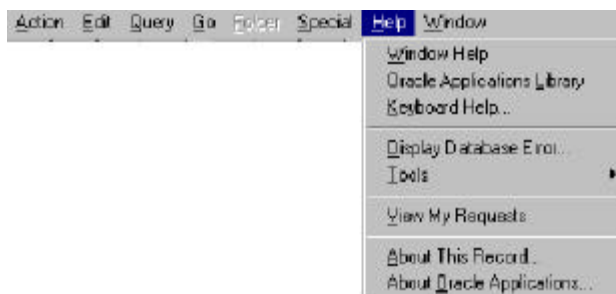
To access the Help menu:

- Click **Help** on the Main Menu Bar.

  OR

- Use keyboard shortcut **[Alt] + h**.

Help Menu Items Below are the items listed in the **Help** menu and the actions you can perform with them. Included for some is a button and/or keyboard shortcut you can use to perform the same function without using the menu.

Click…	To…	Button	Shortcut
Window Help	Read information on performing tasks within the current window. From this point you can also navigate to any other part of the online help system.	?	F1
Oracle Applications Library	Access information on a number of different Oracle applications, including the non-customized Oracle HR.		
Keyboard Help…	View a list of "Keyboard shortcuts" for commonly used functions (see *Keyboard Shortcuts*).		[Ctrl] + [F1]
Display Database Error	View information on the last error.		
Tools	Displays a submenu of diagnostic tools, generally accessible only by your system administrator.		
View my Requests	View the status of your concurrent requests.		
About this Record	View information about the current record.		
About Oracle Applications	View basic copyright, version, and login data for Oracle HR.		

Main Menu Bar: **W**indow Menu

Window Menu | The **W**indow menu provides three choices for displaying open windows, so when you have multiple windows open concurrently you can arrange them according to your preference for viewing them.

The **W**indow menu also lists all windows you currently have open, including your logon "responsibility" (listed with the **Navigator** Window).

To access the Window menu:

- Click **W**indow on the Main Menu Bar.

  OR

- Use keyboard shortcut **[Alt] + w**.

Window Menu Items | Below are the display options listed in the **Window** menu and the actions you can perform with them.

| Click…	To…
Cascade	Display open windows in a "cascaded" or stair-step fashion.
Tile	Display open windows in a "tile" (non-overlapping) fashion.
Arrange Icons	Arrange the icons of any minimized windows side-by-side in the lower-left of the container window.

Toolbar Buttons

Purpose	Instead of selecting items from the menu bar, you can perform many of the same functions by simply clicking certain Toolbar buttons, located just below the Main Menu Bar. The Toolbar buttons replicate many commonly used menu items so you can invoke their actions quickly, without having to search for them in the Main Menu Bar or remember the keyboard shortcut. Some general points:

- Each Toolbar button performs a specific action when you click it.

- Toolbar buttons may be disabled for certain data fields or windows if they are not applicable. Disabled buttons will appear "grayed out."

- If you are unsure of the function of a button, move your mouse over it and a brief function note will appear in the message line at the bottom left of the window.

Toolbar Button Functions
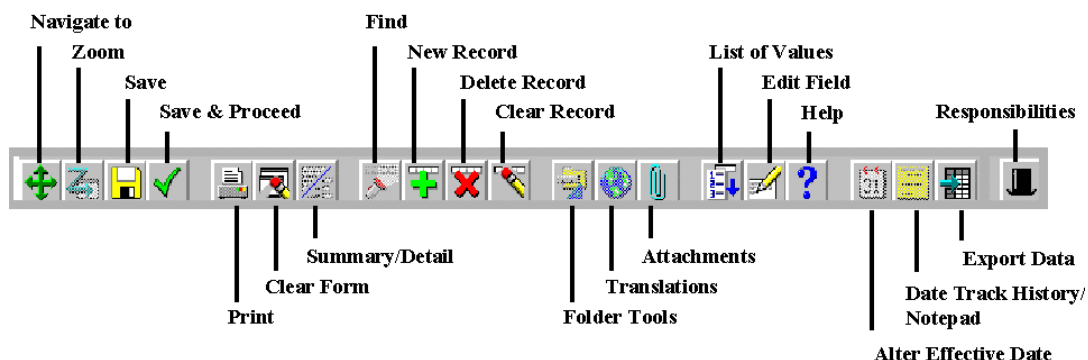
Button	Title	Function
	Navigate to	Returns to the **Navigator** Window.
	Zoom	This function is not available.
	Save	Saves any pending changes.
	Save and Proceed	Saves any pending changes and prepares the window for the entry of a new record. Does not proceed to the next record.
	Print	Prints the current window or a report.
	Clear Form	Clears all data in current window. No information is saved unless the Save Button has been clicked.

Continued on next page

Toolbar Buttons, Continued

Toolbar Button Functions (continued)

Button	Title	Function
	Summary/ Detail	Switches between summary and detail views of a combination block.
	Find	Choosing once invokes the query mode; choosing again runs a query.
	New Record	Creates a new record.
	Delete Record	Deletes the current record from the database.
	Clear Record	Clears all data pertaining to current record in window.
	Tool Palette	Displays the Folder Tool Palette.
	Translations	This function is not available.
	Attachments	Opens the **Attachments** Window.
	List of Values	Shows the List of Values for the current data field (if available).
	Edit Field	Opens the **Editor** Window for the current data field.
	Help	Displays online help.
	Alter Effective Date	Displays the **Alter Effective Date** Window, to change the effective date of an action.
	Date Track History/ Notepad	The *Date Track History* button displays a history of changes made to a record over time. The *Notepad* button displays a window to input notes about an action you are working.
	Export Data	Used to export (copy) data to another document outside the modern DCPDS (e.g., to a spreadsheet).
	Responsibilities	Enables you to switch your logon to another responsibility without having to exit the system. Displays when the **Navigation List** displays.

Keyboard Shortcuts

Purpose   Everything that can be done with a mouse, by "pointing and clicking," can also be done using the keyboard. Keyboard "shortcuts" are alternate ways of invoking the same functions available through the menu and Toolbar keys.

Keys and Functions   Below is a list of common functions and their keyboard "shortcuts."

Function	Keys
Action Menu	**[Alt] + a**
Cancel LOV	**[Ctrl] + c**
Cancel Query	**[Ctrl} + q**
Clear Block	**[Shift] + [F5]**
Clear Field	**[Ctrl] + u**
Clear Form	**[Shift] + [F7]**
Clear Record	**[Shift] + [F4]**
Close Window	**[Ctrl] + [F4]**
Count Matching Records	**[Shift] + [F2]**
Delete Record	**[Shift] + [F6]**
Duplicate Field Above	**[F3]**
Duplicate Record Above	**[F4]**
Edit Field	**[Ctrl] + e**
Edit Menu	**[Alt] + e**
Folder Menu	**[Alt] + f**
Go Menu	**[Alt] + g**
Help	**[F1]**
Help Menu	**[Alt] + h**
Keyboard Shortcuts List	**[Ctrl] + [F1]**
List of Values	**[F9]**
New Record	**[F6]**
Next Block	**[Ctrl] + [Page Down]**
Next Record	**[Page Down]**
Previous Block	**[Ctrl] + [Page Up]**
Query Enter	**[F7]**
Query Run	**[F8]**
Quit And Exit The Modern DCPDS	**[Ctrl] + q**
Quit Menu	**[Alt] + q**
Save Record	**[F10]**
Scroll Down	**[↓]**
Scroll Up	**[↑]**
Tools Menu	**[Alt] + t**

Keyboard Shortcuts, Continued

Accessing the Keyboard Shortcuts list on-line

A list of keyboard shortcuts is also available through the modern DCPDS online help. To access the list:

- Click **Help** on the Main Menu Bar, then Click **Keyboard Help**.

  OR

- Press the **[Ctrl]** + **[F1]** keys at the same time.

A **Keys** Window will display with an alphabetical list of functions and the associated keys to invoke those functions. Scroll down to see additional functions and keys if the entire window is not in view.

Keys	
Function	**Key**
Duplicate Item	F3
Duplicate Record	F4
Edit	Ctrl+e
Enter Query	F7
Execute Query	F8
Help	F1
Left	Left
List of Values	F9
Next Block	Ctrl+Page Down

Use Scroll Bar to see more of list

OK
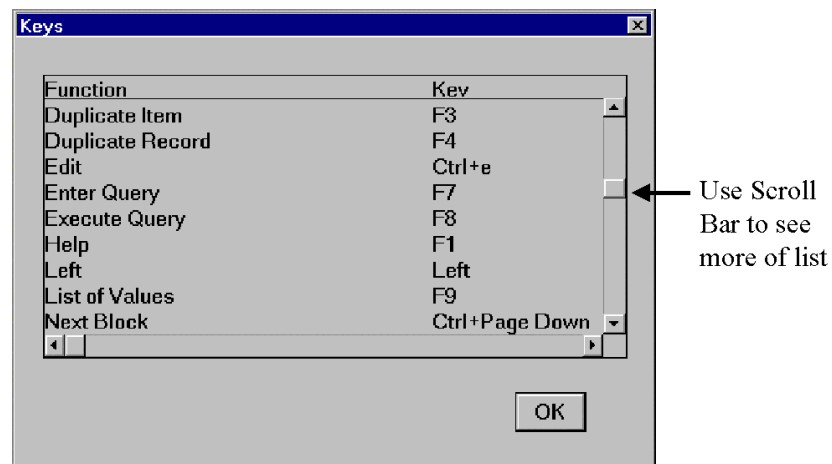
Navigating Within a Window

Overview   Within a window, you can navigate between records, data fields, and blocks using any of the following methods:

- Move the cursor with your mouse, then click in the desired data field.
- Select items from the **Go** menu on the Main Menu Bar.
- Enter keyboard shortcuts.

Menu and Keyboard Methods   The following table lists the specific menu items (from the **Go** menu) and keyboard shortcuts you can use to navigate within a window.

Caution: When navigating from one data field to the next, use **[Tab]** instead of **[Enter]**. If you use **[Enter]** to navigate between data fields, you may get unexpected behavior, because pressing **[Enter]** in some cases will select a default value.

Function Type	To Go to … (move cursor to)	From the Main Menu Bar, Click…	Or Use Keyboard Shortcut…
Record	Previous record	Go → Previous Record	[Page Up]
	Next record	Go → Next Record	[Page Down]
	First record	Go → First Record	
	Last record	Go → Last Record	
Data Field	Previous data field	Go → Previous Field	[Shift] + [Tab]
	Next data field	Go → Next Field	[Tab]
Block	Previous block	Go → Previous Block	[Ctrl] + [Page Up]
	Next block	Go → Next Block	[Ctrl] + [Page Down]

Navigating Within a Window, Continued

Types of Data Fields

The shading of the data fields in a window indicates where data can be entered; where there is read-only capability; or where data fields are not accessible.

Field Color	Action	Methodology
White	You can enter or edit the data in the data field.	You can enter data or the data field is auto populated.
Light Gray	You can <u>only</u> view the information in the data field.	Data field is auto populated and you can not change the information.
Dark Gray	You cannot enter or view the information in the field.	Data is not accessible to you in your present role and responsibility.

Refreshing a Window

Purpose   If you have other application windows open and overlapping modern DCPDS windows, the modern DCPDS windows may redraw improperly. This is a graphics display problem only -- there is no effect on the data or database. You can "refresh" your window to correct the problem.

Note: Refreshing a window is different from refreshing data. Refreshing a window simply redraws the window on your screen. This action does not affect the database or cause a commit action to take place.

How to Refresh a Window   To refresh a window:

- Click **<u>A</u>ction** → **Refresh** from the Main Menu Bar.

List of Values (LOV)

Purpose To guide you through the process of selecting from a List of Values (LOV). An LOV is a list of valid data choices for a datafield.

Instead of having to memorize or look up valid data for each data field, you can choose data from an online list of valid input choices.

Illustration: List of Values
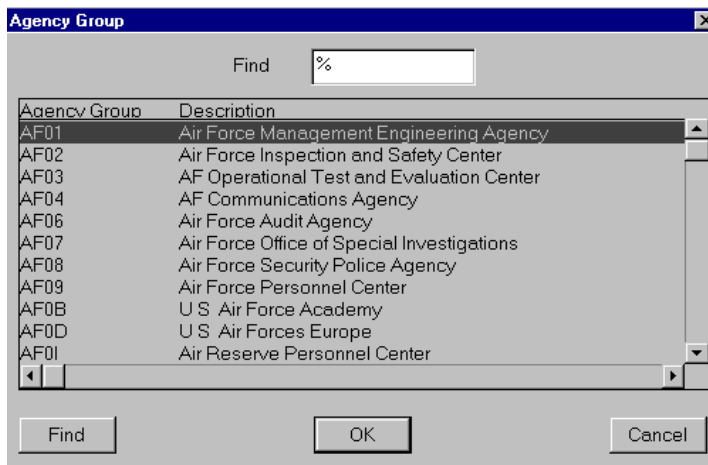
Recognizing When an LOV is Available LOVs are available for many data fields. If a list is available, you will see **<List>** displayed on the Message Line at the bottom of the window when your cursor is in the data field. The LOV button is also grayed out if an LOV is not available.

Displaying an LOV Click the LOV button ⊞ on the Toolbar or within a Flexfield Window; an LOV Window displays containing valid data entries.

Continued on next page

List of Values (LOV), Continued

Selecting From a Short List of Values

If the LOV list is short, the methods in the following table can be used to select and enter a value:

Method	Procedure
Regular	1. Scroll through the list (using your mouse and the scroll bars on the **List of Values** Window). 2. Click a value and click **<OK>**. The **List of Values** Window will close and the value will be inserted in the current data field.
Auto-Selection Feature	With the Auto-Selection feature you can, in some cases, use a single keystroke to select and enter a value from a List of Values. Here is how and when it works: • After you display the **List of Values** Window, type the first character of the value you want to select. • If only one value begins with that letter, then the Auto-Selection feature automatically selects the choice, closes the list window, and enters the value in the data field.

Selecting from a Long LOV

If the LOV is long (more than 100 values), the **Enter Reduction Criteria for Long-List** Window automatically displays. There are several ways to reduce the length of the list to find and select the appropriate value.
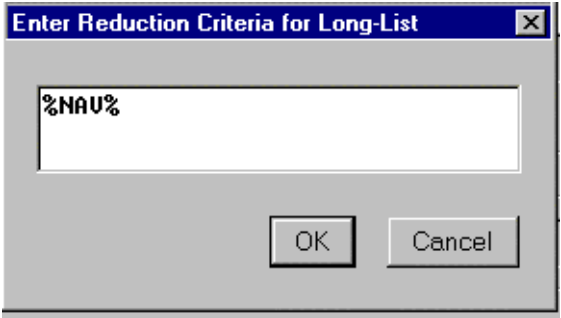
August 25, 2000

List of Values (LOV), Continued

Selecting from a Long LOV (continued)

Method	Procedure

Auto-Reduction Feature
 (Search by First Characters)
	If you know the first characters of the value you wish to select, you can reduce the LOV by using the Auto-Reduction feature. Here's how:
	
	1. <u>Without</u> clicking in the *Find* data field, type the first character(s) of a value.
	
	   This reduces the list to only those values in the first column that match the characters you enter.
	
	   ◆ **Example:** Typing "ar" will reduce the list to values whose first word, in the first column, begin with "ar" (such as "Army …").
	
	2. Scroll through the shortened list, click a value, and click **<OK>**.

"Find"	If you do not know the initial characters of the value you wish to select, but do know that your choice contains a certain word or set of characters, you can perform a list search:
	
	1. Click in the *Find* data field of the LOV.
	
	2. Enter your search criteria, typing a percent sign % before and/or after typing a string of characters you know are in the value you want to select (the % sign is a "wildcard" character).
	
	   ◆ **Example:**
	
	   Find %nav%
	
	   Type %nav% in the *Find* data field and click the **<Find>)** button. All values that contain "nav" within them, such as "US Special Operations Command (Navy)," "Naval Sea Systems Command", will display on your screen.
	
	3. Click **<Find>**.
	
	4. Click a value and click **<OK>**.

List of Values (LOV), Continued

Selecting from a Long LOV (continued)

Method	Procedure
Enter Reduction Criteria for Long List Window	If the **Enter Reduction Criteria for Long List** Window displays: • Type in the first few characters of the value you need to select. *Or* • If you are not sure of the initial characters of the value you need to select, type the percent sign (%) wildcard before and after a string of characters you know are in the value (as in the example below). **Example:** Enter Reduction Criteria for Long-List %NAV% OK Cancel An LOV displays that includes only values that meet your reduction criteria. To view the entire long-list, enter a percent sign (%) only. You will want to avoid doing this in most cases because the response time can be excessive.

List of Values (LOV), Continued

How to Use Power List

The *Power List* feature provides an even faster method of data entry.

If a data field displays the **<List>** message and you know the value to enter:

1. Without displaying the LOV, type the first few characters of the value in the data field. You can include a percent sign (wildcard character) with your entry.

2. Press **[Tab]**.

Power List completes the entry for you, or:

- If more than one value matches the characters you entered, a list window containing those values displays.

- If no values match the characters you entered, an LOV Window containing all values displays.
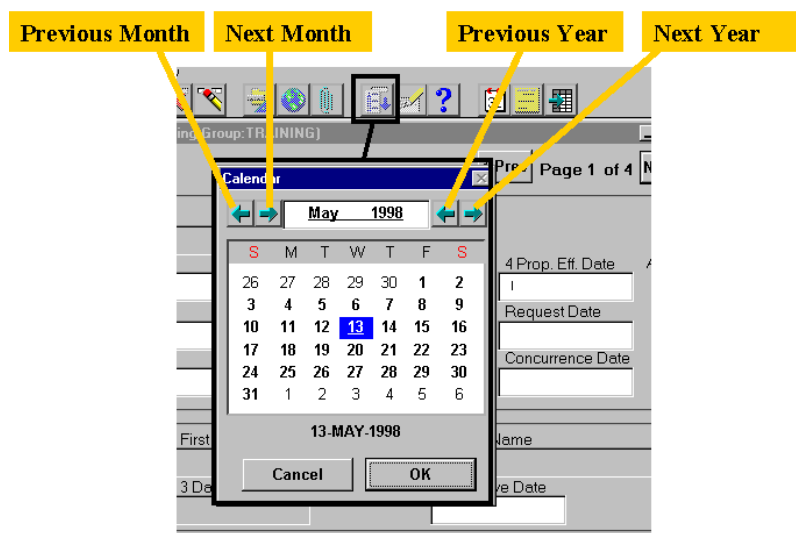
Enter Dates Using the Calendar

Purpose To explain the steps needed to use the calendar button. The calendar feature, essentially an LOV, provides an easy way to find and enter a valid date.

Illustration

If the data field requires a date, the Toolbar LOV (when clicked) displays a calendar.

Entering a Date Using the Calendar

Step	Action
1	Click in the applicable date data field, then: Click the LOV button on the Toolbar. The **Calendar** Window displays (see illustration above). The date value that appears below the calendar is either the value already in the data field, the default value of the data field, or the current system date. **Note:** The Toolbar button that displays the graphic of a calendar does <u>not</u> directly access the calendar. It is now known as the Alter Effective Date button.

Enter Dates Using the Calendar, Continued

Entering a Date Using the Calendar (continued)

Step	Action
2	Select the month and year you wish to enter by clicking the arrows at the top of the **Calendar** Window until the desired month and year display:

	To Display:	Click:
	Previous Month	*Left* arrow button to the *left* of the *month* display
	Next Month	*Right* arrow button to the *left* of the *month* display.
	Previous Year	*Left* arrow button to the *right* of the *year* display.
	Next Year	*Right* arrow button to the *right* of the *year* display.

| Step	Action
3	Click a day button. **Note:** Disabled buttons that show dimmed text represent invalid days, which cannot be selected.
4	Click <**OK**> to accept the selected date and close the **Calendar** Window.

Flexfields

Definition A *Flexfield* is a data field made up of sub-fields, or segments that contain a number of data fields or separate pieces of data. In contrast, regular information fields hold just one unit of information.

When entering data in a flexfield, it will "open" to display a separate window. Within each flexfield window are multiple data fields (a separate data field for each of the flexfield's segments).

Edits for Correct Data Entry Data entered into flexfields can be validated, and cross-validated, by the application to ensure the values or combination of values entered meet organizational business rules. For example, you would get an error message if you entered a value for security access that was not appropriate in accordance with the value input for position sensitivity.

What You Will See Generally, when you click in a Flexfield, a "flexfield window" will display (in some cases, you will need to click in the flexfield and then click the List of Values button). Within each flexfield window are multiple data fields (a separate data field for each of the flexfield's segments).

Types of Flexfields There are two types of flexfields:
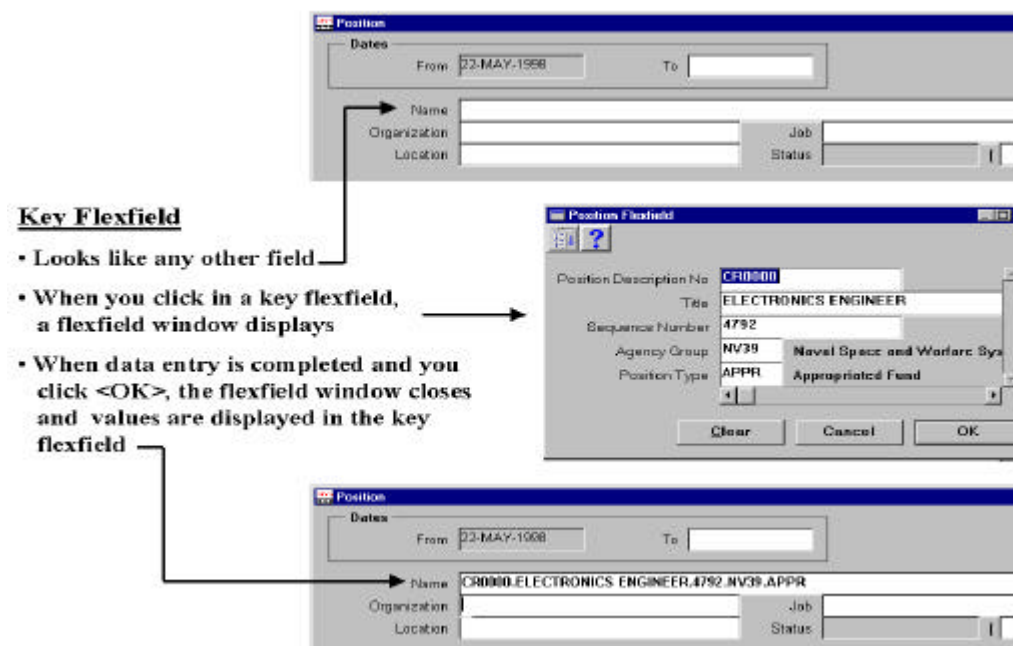- *Key Flexfields*
- *Descriptive Flexfields*

Flexfields, Continued

Illustration
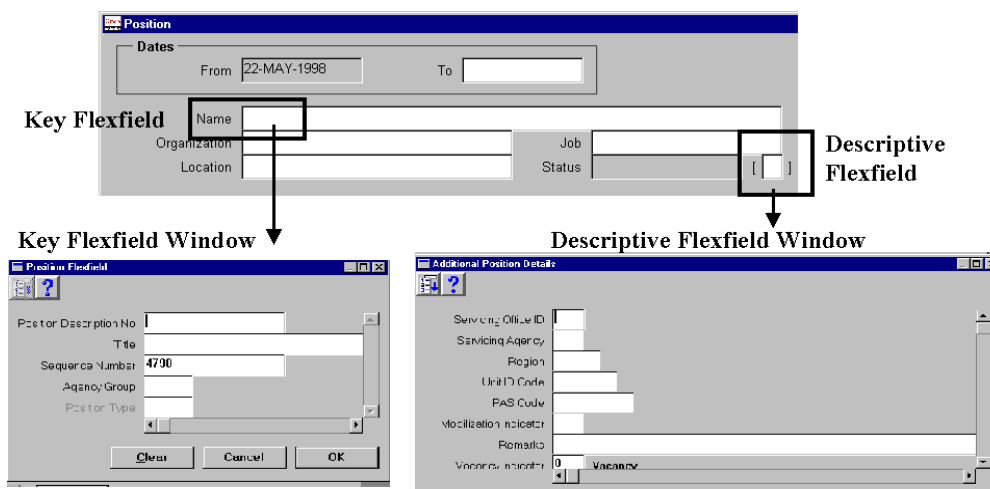
Key Flexfields   A key flexfield looks like any other data field initially, but you will find you can "open" the flexfield to display a separate window. Within each flexfield window are multiple data fields (a separate data field for each of the key flexfield segments).

Flexfields, Continued

Descriptive Flexfields

A *descriptive flexfield* appears in a block as a two-character, unnamed data field enclosed in brackets. Similar to a key flexfield, it provides the "expansion room" necessary for DoD to customize the commercial Oracle HR product. When you put your cursor into a descriptive flexfield, a descriptive flexfield window displays:
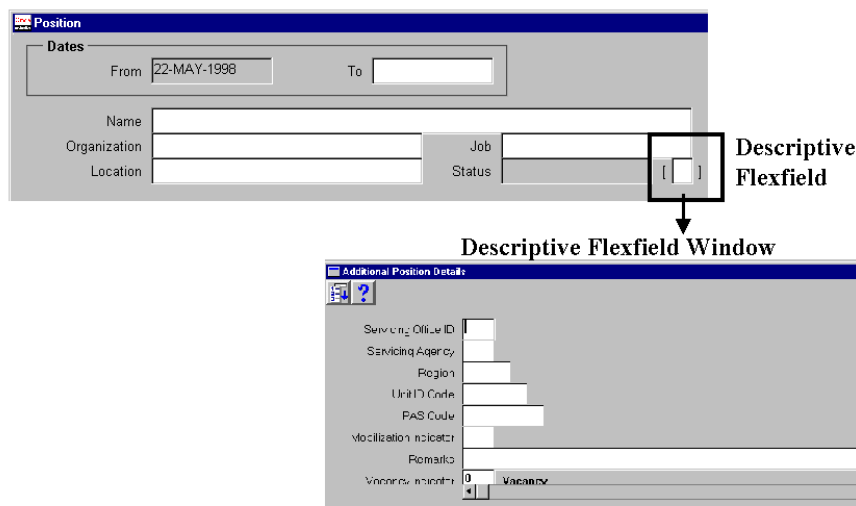
Note: You can never update or insert values directly into a descriptive flexfield without displaying the descriptive flexfield window (unlike key flexfields where this is sometimes possible).

Entering Data in a Flexfield

Specific procedures for entering data in each data field are provided throughout this User Guide organized by the task you must complete. It is not necessary to know ahead of time if a data field is a flexfield.

Step	Action
1	Click in the flexfield. If a flexfield window does not automatically display, click the LOV on the Toolbar.
2	Enter data in each of the data fields as you would any other data field, using the LOV located within the flexfield window (instead of the one on the Toolbar).
3	Click **<OK>**. This will close the flexfield window and return you to the previous window to continue your task.

New Record

Purpose	To describe the steps necessary to create a new record in the database.

See Also 👓	Module 1, Fundamentals for the modern DCPDS • Main Menu Bar: Edit Menu

Creating a New Record

Step	Action
1	• Click **Edit** → **New Record** from the Main Menu Bar. *OR* • Click New Record button ⊞ on the Toolbar.
2	• Click **Action** → **Save** *Or* **Action** → **Save and Proceed** from the Main Menu Bar *OR* • Click Save button 💾 *Or* Save and Proceed button ✔ on the Toolbar. The record is saved to the database.

🖋 **Notes:**

- When you insert a new record in a multi-record block, the system moves the current block down and inserts a new blank row. You add a new record by filling in this row.

- When you insert a new record in a single-record block, the system displays a blank record in the current block so you can enter data for a new record.

Delete Record

Purpose   To describe the steps to delete a record from the database.

See Also   Module 1, Fundamentals in the modern DCPDS
👓   • Main Menu Bar: Edit Menu

**To Delete a
Record**

Step	Action
1	• Click **Edit** → **Delete Record** from the Main Menu Bar. *Or* • Click Delete Record button ❌ on the Toolbar.
2	• Click **Action** → **Save** *Or* **Action** → **Save and Proceed** from the Main Menu Bar. *Or* • Click 💾 (Save button) *Or* ✅ (Save and Proceed button) on the Toolbar. The record is now deleted from the database.

Note: If you exit without saving your work, the record will not be deleted from the database.

Copying and Moving Data

Purpose	To guide you through the steps to copy or move data from one data field to another.

See Also 👓	Module 1, Fundamentals of the modern DCPDS • Main Menu Bar: <u>E</u>dit Menu

Terms

Term	Definition
Copy	Refers to the process of making a duplicate or *copy* of data already in one data field, to then be inserted or *pasted* in another data field. When you use the *copy* function, the data you copy is temporarily stored on the "clipboard" until you "paste" it to another location or until you "cut" or "copy" other data.
Clipboard	A temporary storage place for data that has been *copied* or *cut*. Clipboard contents are replaced with the next "copy" or "cut" action.
Cut	Refers to the process of removing or *cutting* data from one data field, and inserting or *pasting* it in another data field. You use the cut function when you want to **move** data from one data field to another. When you use the *cut* function, the data you copy is temporarily stored on the "clipboard" until you "paste" it to another location or until you "cut" or "copy" other data.
Paste	The function of *pasting* the contents of the clipboard into the current data field.

Copying or Moving Data ✒	**Note:** The *cut* function is only available if the data field can be updated. This is because the cut function removes data from its current location.

Copying and Moving Data, Continued

Copying or Moving Data (continued)

Step	Action
1	Highlight the data you wish to copy or move; to do this: • **[Tab]** to the data field (when you tab to a data field with text in it, the text is automatically highlighted and ready to copy or cut). *Or* • If the data has no spaces (e.g., one word instead of two), simply double-click on the data. *Or* • Move your mouse so your cursor is to the left or right of the text you wish to copy. Click and continue to hold your mouse button down while you drag your cursor over the data, releasing the mouse button when you get to the end of the text to be copied.
2	**To do this…** **Do this…** **Copy** the Data • Click **Edit** → **Copy** from the Main Menu Bar. *OR* • Press **[Ctrl]** + **c**. **Move** the Data • Click **Edit** → **Cut** from the Main Menu Bar. *OR* • Press **[Ctrl]** + **x**.
3	Click the data field where you wish to insert the copied or cut data and: • Click **Edit** → **Paste** from the Main Menu Bar. Or • Press [**Ctrl**] + **v.** The data displays in the current data field.

⚠ **Caution:** Clipboard contents will be replaced with the next "cut" or "copy" action. To avoid losing clipboard contents (data that has been cut or copied), "paste" it to the desired location before you "cut" or "copy" other data.

Clear Data

Purpose
To describe the steps to enter data and then "erase" the data without saving it to the database by using the **Clear** function.

The data you clear is erased from the window. If the data has already been saved to the database, the clear function will not delete the data from the database.

If the data is new and has never been saved to the database, it will be lost permanently when you clear it.

See Also
66ʹ
Module 1, Fundamentals of the modern DCPDS
- Main Menu Bar: Edit Menu

Clearing Data
Use the procedures below to clear data from a data field, record, block, or form.

To Clear Data From a…	From the Main Menu Bar, Click …	From the Toolbar Click…	Or Use Keyboard Shortcut…
Data field	Edit → Clear Field		[Ctrl] + u
Record	Edit → Clear Record		[Shift] + [F4]
Block	Edit → Clear Block		[Shift] + [F5]
Form	Edit → Clear Form		[Shift] + [F7]

Duplicating a Data Field

Purpose	To describe the steps to duplicate data from a previous record if much of the data needs to be repeated again in a new record.

See Also 👓	Module 1, Fundamentals of the modern DCPDS • Main Menu Bar: <u>E</u>dit Menu

Copying a Data Field Value from the Previous Record	1. Enter a new record or query an existing record in a window. 2. Click **<u>E</u>dit** → **<u>N</u>ew Record** from the Main Menu Bar to insert a new record after the existing record. 3. Navigate to the data field whose value you want to duplicate in the new record. 4. Click **<u>E</u>dit** → **Duplicate Field Ab<u>o</u>ve** from the Main Menu Bar to copy the data field value from the previous record to the current record or press **[F3]**.

Copying <u>All</u> <u>Data Field</u> <u>Values</u> from the Previous Record	1. Enter a new record or query an existing record into your form. 2. Click **<u>E</u>dit** → **<u>N</u>ew Record** from the Main Menu Bar to insert a new record after the existing record. 3. Click **<u>E</u>dit** → **D<u>u</u>plicate Record Above** from the Main Menu Bar to copy all data field values from the previous record to the current record. **Note:** The **D<u>u</u>plicate Record Above** menu item will not duplicate data fields that must be unique.

When Not Applicable	The **Duplicate Field Ab<u>o</u>ve** and **D<u>u</u>plicate Record Above** menu items are not available if there is no previous record (for example, if you are on the first record of a block).

Editing a Data Field Using the Editor Window

Purpose   To provide the steps to view, enter, or update the contents of a text data field by using the **Editor** Window. Using this window is not necessary, but it can be useful for doing a search and replace in a data field that contains a lot of text.
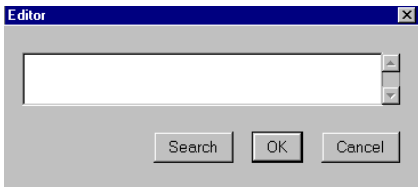
See Also   In this chapter:
🕶   Main Menu Bar: Edit Menu

**Using the
Editor Window**

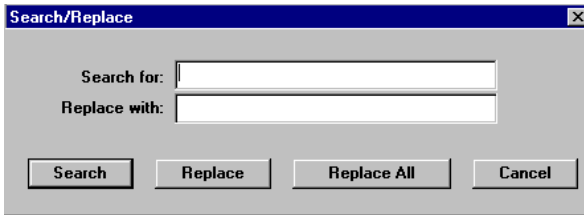| Step	Action
1	• Click **Edit** → **Edit Field…** from the Main Menu Bar. *Or* • Use keyboard shortcut [**Ctrl**] + **e**. The **Editor** Window displays:
2	• Type in a new value *Or* edit the existing value in the **Editor** Window. *Or* • Follow the procedures below to search for a phrase and replace it with another phrase. **Note:** If the current data field is a display-only data field, the **Editor** Window displays in a display-only mode.
3	Click **<OK>** to close the window and insert the value in the data field.

Editing a Data Field Using the Editor Window, Continued

Searching and Replacing Text

Follow the procedures below to search for a phrase within the text of the data field. If you choose, you can also replace the piece of text with another piece of text.

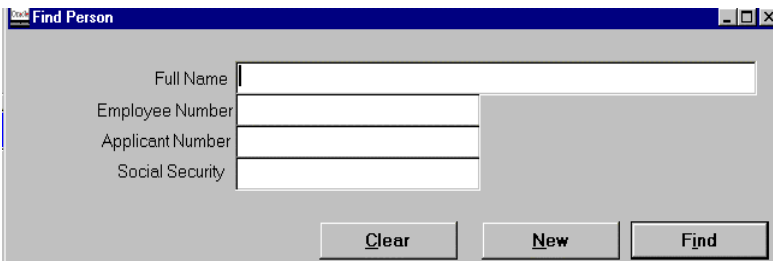| Step	Action
1	• Click **Edit** → **Edit Field…** from the Main Menu Bar. *OR* • Use keyboard shortcut [**Ctrl**] + **e**. The **Editor** Window displays.
2	Click **<Search>** in the **Editor** Window to display a **Search/Replace** Window: **Search/Replace** Search for: Replace with: Search Replace Replace All Cancel
3	Type a value in the *Search for* data field. If you want to replace that value with another value, type the new value in the *Replace With* data field.
4	• Click **<Search>** to search for the value. *Or* • Click **<Replace>** to search for the value and replace the first occurrence with the new value. *Or* • Click **<Replace All>** to search for the value and replace all occurrences with the new value.
5	When you are satisfied with the value in the **Editor** Window, click **<OK>** to close the window and insert the value in the data field.

Direct Data Element Updates

Purpose After an employee is on board, you can update the database to add new information or change existing information. If an SF-50, Notification of Personnel Action, or a Request for Personnel Action (RPA) is **not** required, you can perform a direct data element update to the database.

Updating a Direct Data Element Follow the procedures below to update information in the database when no SF-50, Notification of Personnel Action, is required (if a SF-50 is required, use the Request for Personnel Action).

Step	Action
1	From the **Navigation List**, click *People → Enter and Maintain*. The **Find Person** Window displays.
2	In the Find Person window, query for the employee by either their social security number or name: • Click in the *Social Security* data field and then: • Type in the employee's social security number, with the dashes (format: NNN-NN-NNNN). • Click **<Find>**. *Or* • Click in the *Full Name* data field: • Type in the employee's last name, or portion of it, followed by a percent sign (%). (Example: **Robb%**) • Click **<Find>**. A List of Values displays; click the employee's name.

Direct Data Element Updates, Continued

Updating a Direct Data Element (continued)

Step	Action
3	The **People** Window (employee's record) displays. If the effective date of the data change is not the current date, click the Alter Effective Date button ⬚ on the Toolbar and alter the effective date.
	(Refer to the Fundamentals module, Dated Information and DateTracking chapter if you are not familiar with DateTracking).
4	Navigate to the data field to be updated by clicking on the appropriate Taskflow Button at the bottom of the window, and then any subsequent Taskflow Buttons and list windows.
	If you navigate to a list of categories in a window that has a *Details* field at the bottom of the window:
	• Scroll through the list of categories. If all are not in view, click the "down" arrow to the left of the category or press **[Page Down]** or **[Page Up]** on your keyboard to scroll down or up through the list.
	• Click the appropriate category.
	• Click in the *Details* field at the bottom of the window.
	This displays a window with specific data fields related to the category.
5	Click the data field you need to update and edit the data field as required. Use the LOV within the window as necessary.
6	Click the Save button 💾 on the Toolbar to save the change to the database.

Direct Data Element Updates, Continued

Updating a Direct Data Element (continued)

Step	Action
7	If you are changing existing data, an **Option** window will display asking you to select **<Update>** or **<Correction>**: • Click **Update** to change the record as of the effective date you specify. When you update a record, all previous information is preserved and can be viewed in history. • Click **Correction** if the previous data is incorrect. The new information will override the previous information back to the date that the error occurred. Refer to the section of the User Guide titled Understanding DateTrack (Module 1, Chapter 4) for more information about updates vs corrections.
8	The Message Line will indicate that your transaction has completed and has been applied and saved to the database.

Saving Your Work

Purpose
To update the modern DCPDS, you need to save all data that you enter, edit, or delete.

Saving your work is sometimes referred to as "committing a change" or "transaction".

In many cases, the modern DCPDS will prompt you to save your work before proceeding.

Edits for Correct Data Entry: "Validation"
When you click *Save*, the modern DCPDS checks your work ("validates" it) against certain built-in edits, to ensure the values or combination of values entered meet HR Federal and DoD business rules.

If your work meets the edit criteria, a Message Window and the Message Line notifies you that your work will be saved to the database.

Example:

Successful Save Message Window →

Forms

FRM-40400: Transaction complete: 2 records applied and saved.

OK

Message Line →

FRM-40400: Transaction complete: 2 records applied and saved.

If any of the data you enter is invalid (i.e., does not meet required business rule edits) or if required data is missing, an error message displays describing the problem to you.

Example:

Error

Health Plans and Health Enrollment must be entered. (civ_enter_health)

OK
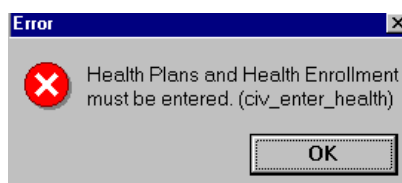
Caution: If you receive an error message, your data **will <u>not</u> be saved** to the database. You need to correct the problem and try the save again.

Saving Your Work, Continued

Saving Your Work   Use the following methods to save your work.

To:	On the Main Menu Bar Click…	Or On the Toolbar Click…	Or Use the Keyboard Shortcut…
Save your work	A̲ction → S̲ave	💾	**[F10]**
Save your work and enter a new transaction	A̲ction → S̲ave and Proceed	✅	

Printing a Window

Purpose   You can print an image of the current window at any time.

How to Print a Window   To print a current window:

Step	Action
1	Click **Action** → **Print** from the Main Menu Bar. A **Print Setup** Window will display.
2	• Enter any necessary information on the **Print Setup** Window, such as printer, size of the image, orientation. Then click **<OK>**. • A second **Print Setup** Window will display. Enter any necessary information, such as number of copies, and click **<OK>**.
3	Another window will display, informing you that the application is about to capture the image of your window, and you should not move or obstruct the window you want to print. Click **<OK>** and wait for the image capture to complete. **Note**: In the "Motif GUI environment" you will need to move this window so it does not overlap the window you want to print. To move the window, click in the blue title bar and don't release the mouse click. While still holding down the mouse button, move the mouse to "drag" the window to another part of the screen. Release the mouse button when the window is positioned where you want it.
4	A final window displays to confirm the image capture is complete. Click **<OK>** and then retrieve the page from your printer.

Attaching a Document

Purpose	This section guides you through the steps to attach, view, print, and delete an attachment to a record.

Before You Begin	• Supporting documentation is sometimes required with an RPA, Position, People, Activity, or other record. You can attach short comments, word documents, images, video, OLE objects, or Web pages to many records. For example, you can attach a position description to a position record.
	• When the Attachments button is enabled, it becomes a solid paper clip. It switches to a paper clip holding a paper when it is enabled and the current record has at least one attachment.
	• Each record can have one or more attachments and you can copy attachments from one record to another. You can store the attachments in the database or in your file system in the Document Catalog.
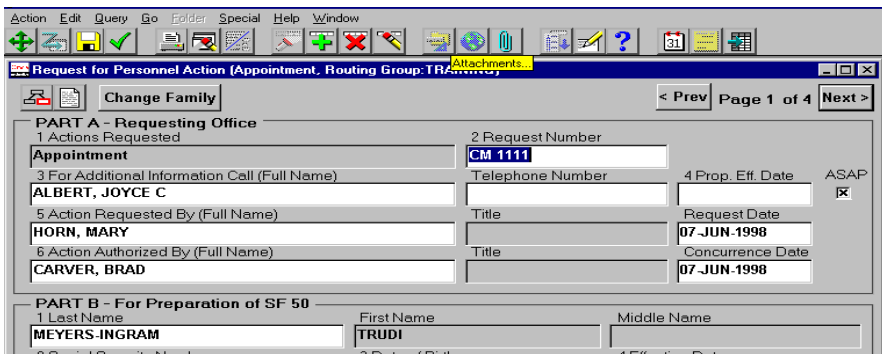
Attaching a Document	For illustration purposes, attaching a document to an RPA is used.
	Follow one of these paths to access the RPA.
	• **Navigation List** → *Request for Personnel Action* → *Nature of Action* → **<Open>**.
	OR
	• **Navigation List** → *Civilian Inbox* → **<Open>**. Select the RPA that you need to process from the Notifications Summary Window.
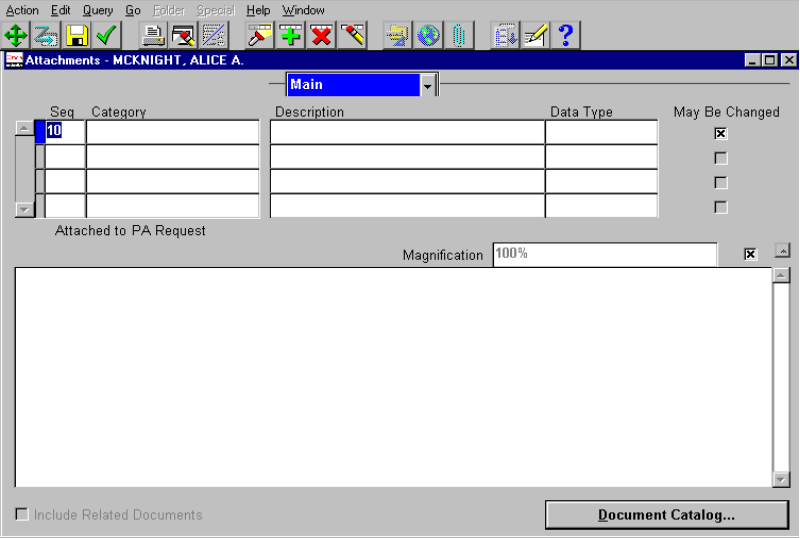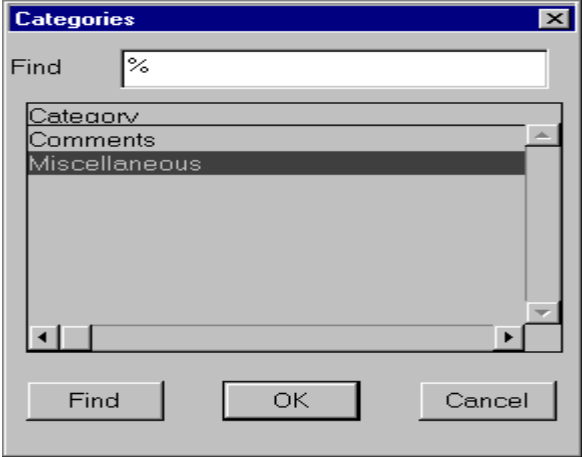
Step	Action
1	The RPA displays. Click the Attachments button on the Toolbar.

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Attaching a Document, Continued

Attaching a Document (continued)

Step	Action
2	The **Attachments** Window displays. The *Seq* number is system-generated. The drop-down menu at the top displays *Main* or *Source* which are alternative regions to give you more options/segments to determine what kind of attachment you have. With your cursor in the *Category* data field, click the LOV.
3	The **Categories** Window displays. Select *Comments* or *Miscellaneous* and click **<OK>**. *Miscellaneous* has been selected for illustration purposes.

Attaching a Document, Continued

Attaching a Document (continued)

Step	Action
4	Type in the information you want to attach such as a job description, chart, name of word document, etc. This is a free flow text field of 255 characters. Press **[Tab]** on your keyboard.
5	With your cursor in the *Data Type* data field click the LOV. Select the format for your data and click **<OK>**. OLE Object is selected for illustrative purposes.

<div align="center">

Datatypes ✕

Find   %

Datatype
Image
Long Text
OLE Object
Short Text
Web Page

Find   OK   Cancel

</div>

You can select any of the data types listed.

- "Image" places a picture in the text area.

- "Long Text" is text stored in the database containing 2000 characters or more and is used when *Comments* is selected.

- "OLE Object" is representative of a document – word, power point, etc. in the text area.

- "Short Text" is text stored in the database containing less than 2000 characters.

- "Web Page" is a URL reference that you can view with your Web browser. You must define your Web browser to view a Web page attachment.

Attaching a Document, Continued

Attaching a Document (continued)

Step	Action
6	Place your cursor in the large white area below "Attached to PA Request" and **Right click** your mouse to display a drop down menu. Click *Insert Object...* Cut Copy Paste Paste Special... Delete Object Links... Insert Object... Object
7	The **Insert Object** Window displays. This window gives you options on the types of objects you can insert as attachments. **Insert Object** Object Type: Microsoft Map, Microsoft Music Control, Microsoft Photo Editor 3.0 Photo, Microsoft Photo Editor 3.0 Scan, Microsoft PowerPoint Presentation, Microsoft PowerPoint Slide, **Microsoft Word Document**, Microsoft Word Picture, Microsoft WordArt 3.0 ○ Create New: ○ Create from File: ○ Create Control: OK Cancel ☐ Display As Icon Result: Inserts a new Microsoft Word Document object into your document. You can select attachment information for insertion into the text area by clicking one of the three radio buttons: • Click **Create New** to create a new object document that you can create in the text area. • Click **Create from File** to insert a file document in the text area of the **Attachment** Window. • Click **Create Control** to create a control document attachment.

Attaching a Document, Continued
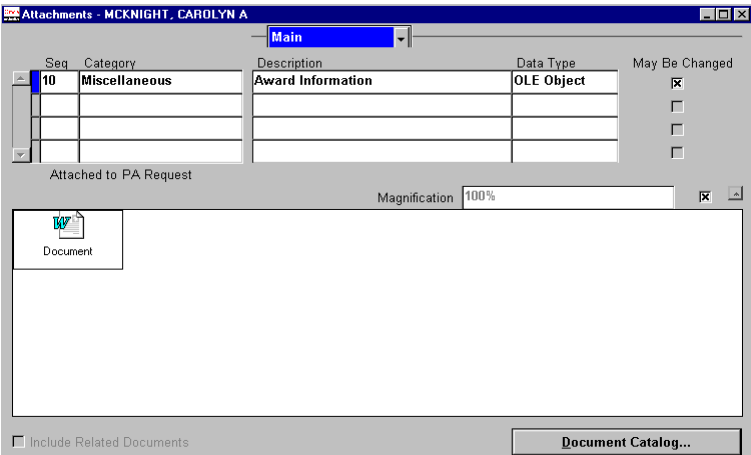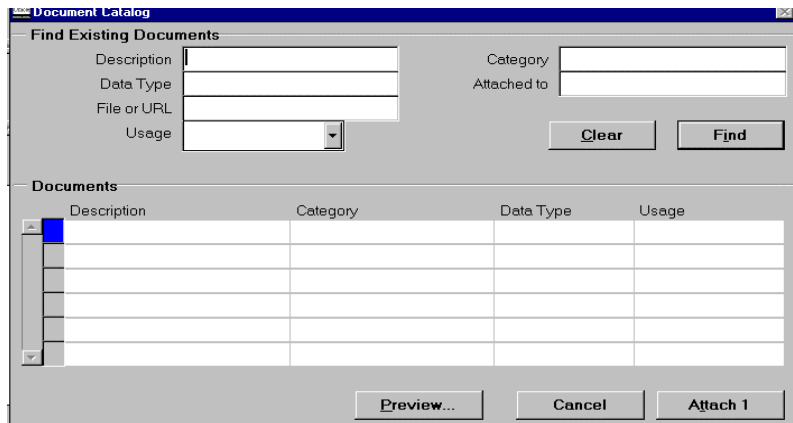
Attaching a Document (continued)

Step	Action
8	**Create from File** has been selected for illustrative purposes. Click **<Browse>** to select the drive, directory, and file you use as an attachment, just as you would in Microsoft Word, Excel or PowerPoint files. Then click the **Link** checkbox to "link" the attachment. The **Result** Region explains the functionality of the radio button.
8	Select the checkbox next to *Display As Icon* to display the document icon in the text area of the **Attachment** Window. If you do not select the checkbox, the entire document displays in the text area. **<Change Icon…>** changes the "Word Document" icon image to another icon image.
9	Click **<OK>**.

Attaching a Document, Continued
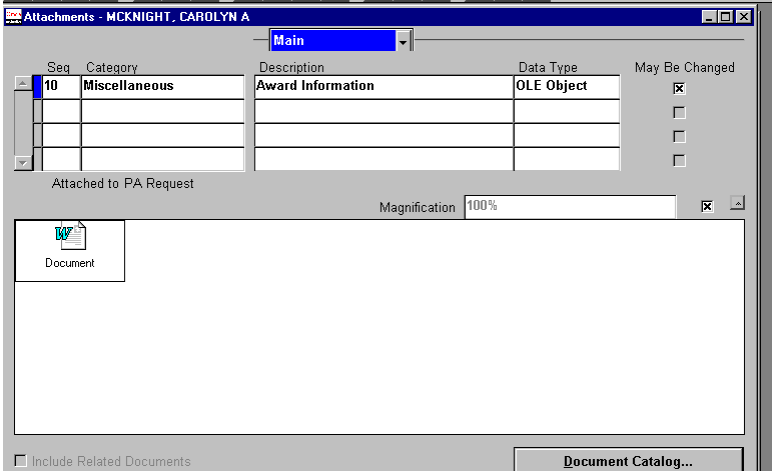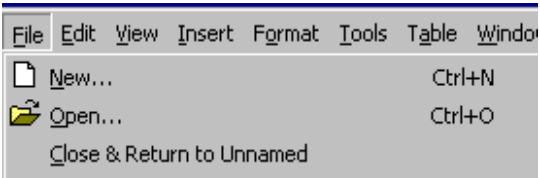
Attaching a Document (continued)

Step	Action
10	The **Attachments** Window displays with the icon in the text area. The checkboxes next to the *Data Type* column indicate if the data "may be changed" when the box is selected. **Note:** Multiple data types can be inserted into the text area as attachments for the document being processed.
11	Click **<Document Catalog…>** to display the **Document Catalog** Window. This is much like a file folder to store and retrieve documents you have used previously as attachments.
12	Save the action and exit the window to return to the RPA Window.

Viewing and Printing the Attachment
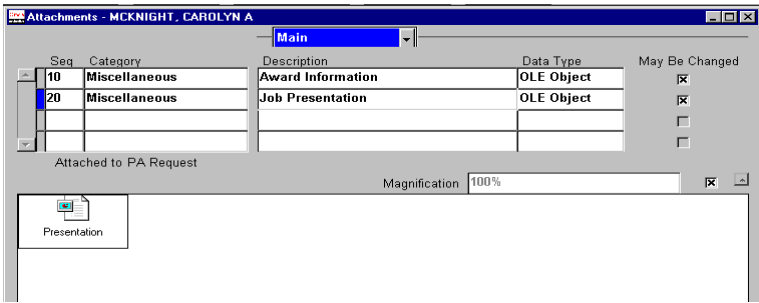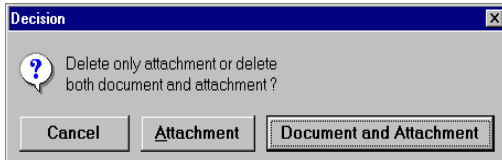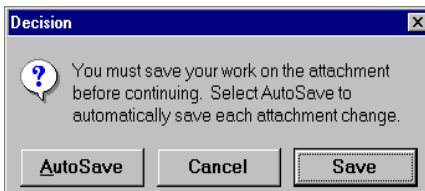
Viewing and Printing

Step	Action
1	To view the attachment(s) to a record, open the record, e.g., RPA, Position, and click the Attachment button on the Toolbar. Attachment Button Highlighted **Note:** The shading on the bottom half of the button indicates there is an attachment.
2	The **Attachments** Window displays. Use the left scroll bar to locate the *Seq* and *Category* you need to view and print. Double-click the icon or text attachment in the text area. The attachment displays for viewing.
3	To print, double click the icon in the text area to open, then click print on the menu and follow the printing instructions.
4	To close the document, click **File** on the Menu Bar. Click **Close & Return to Unnamed** to return to the **Attachments** Window.

Deleting an Attachment

Deleting an Attachment

Step	Action
1	After selecting the action which has an attachment you want to delete, click the Attachment ⬚ button on the Toolbar.
2	The **Attachments** Window displays. Use the left scroll bar to select the *Seq* number you want to delete in the **Attachments** Window. Click the Delete Record ❌ button on the Toolbar.
3	A Message Box displays and asks, "Delete only attachment or delete both document and attachment?" Click **<​A​ttachment>** or **<Document and Attachment>**.
4	A second Message Box displays and states, "You must save your work on the attachment before continuing. Select AutoSave to automatically save each attachment change." Click **<AutoSave>** or **<Save>** and exit the window.

Copying an Attachment from Another Record

**Copying An
Attachment**

Step	Action
1	Query the record you want to attach a document to. Do NOT query the record that already has the attachment.
2	With the record open, click **<Attachments>** on the Toolbar. The **Attachments** Window displays.
3	Click **<Document Catalog>**. The **Document Catalog** Window displays. With your cursor in the *Attached To* data field, click the LOV and select the application object or enter the query criteria for the one you need.
4	Click **<Find>**. Check one or more documents and click **<OK>**.
5	Click **<Attach 1>**.
6	Click Save on the Toolbar 🖫 .

Viewing and Changing Quick Codes

Purpose   This procedure will show you how to customize certain values within Oracle HR to accommodate local needs.

Who Does It   The Component will determine who will be given this responsibility. It is usually assigned to a Systems Administrator.

Before You Begin

- Your ability to add new codes or disable codes that are supplied is determined by the access level of the Quick Code Type:

  - **User** - You can add codes and you can disable supplied codes.

  - **Extensible** - You can add codes, but you cannot disable supplied codes because the system uses them.

  - **System** - You can neither add codes nor disable supplied codes. You can only change the meaning or description of supplied codes.

- Determine if the code you want to change or add is user or extensible. A list of the user and extensible codes is as follows:

Viewing and Changing Quick Codes, Continued
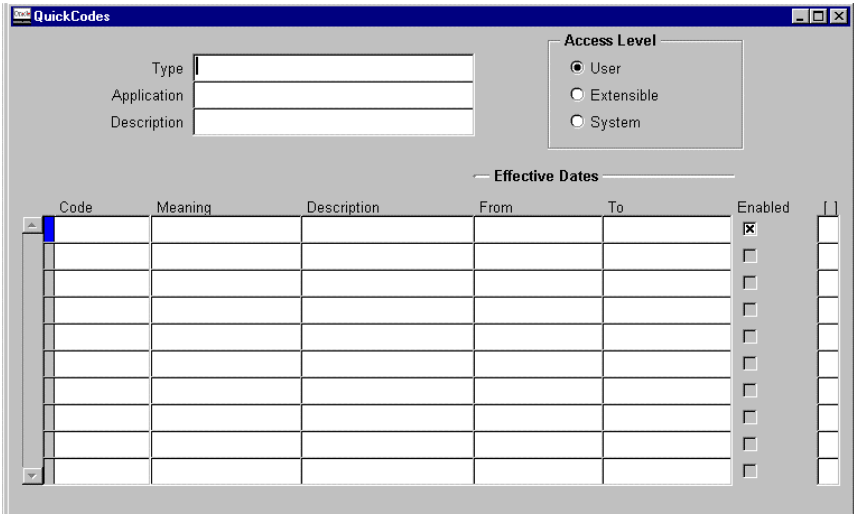
Examples of User and Extensible Codes

FIELD	QUICK CODES
• Category	ACTIVITY_CATEGORY
• Marital Status	MAR_STATUS
• Success Criteria	ACTIVITY_SUCCESS_CRITERIA
• Reason (for leaving)	LEAV_REAS
• Status	ACTIVITY_USER_STATUS
• Source (of enrollment)	BOOKING_SOURCE
• Failure	DELEGATE_FAILURE_REASON
• Event Type	DEV_EVENT_TYPE
• Reason for Change	ENROLMENT_STATUS_REASON
• User Status	EVENT_USER_STATUS
• Priority	PRIORITY_LEVEL
• Type (of prof credit)	PROFESSIONAL_CREDIT
• Group	PROGRAM_MEMBERSHIP_GRP
• Role	PROGRAM_MEMBERSHIP_ROLE
• Type (of resource)	RESOURCE_TYPE
• Reason	RESOURCE_USAGE_REASON
• Training Center	TRAINING_CENTRE
• Trainer Role	TRAINER_PARTICIPATION
• Unit	TRAINING_UNIT

Viewing and Changing Quick Codes

Accessing the Quick Codes Window

Step	Action
1	On the **Navigation List** → *Other Definitions* → *Quick Code Values* → **\<Open>**.
2	The **Quick Codes** Window displays with three data fields, the **Access Level** Region, and five columns. An *Enabled* checkbox and *[ ]* (an unused Descriptive Flexfield) are also shown.

Data Fields   Descriptions on input for the data fields are below.

Data Fields and Buttons	Description/Action
Type	See User and Extensible Codes table
Application	Oracle HR
Description	Defines Type
User	See "Before You Begin"
Extensible	See "Before You Begin"
System	See "Before You Begin"
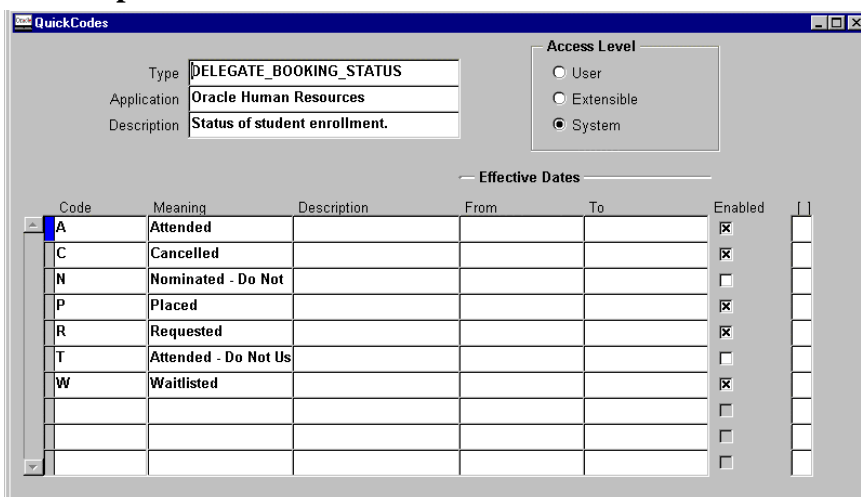
Viewing and Changing Quick Codes, Continued

Query for Quick Codes

Step	Action
1	Query the **Quick Codes** Window with one of the query methods.
2	Use the page up and page down arrow keys to move to the next quick code category to select the one you need.

Making Quick Code Changes

Step	Action
1	Input a unique code for the item to be added or changed. Usually, this will be a capital letter or set of letters. For example, the code under DELEGATE_BOOKING_STATUS shows an "A" for attended and a "C" for cancelled. **Example:**

Viewing and Changing Quick Codes, Continued

Making Quick Code Changes (continued)

Step	Action
2	Type a short explanation for the new code. For example, you may want to change the word Requested to Pending, or add Pending as a new code. Pending would be input in the *Meaning* data field.
3	Provide a short description of the new meaning in the *Description* data field.
4	The effective *From* date will automatically populate as the date the change is made.
5	Use the *To* date to stop the use of a code after a certain date. Deselecting the "x" in the Enabled check box may also disable codes. They will no longer appear in the LOV but users can continue to see the value when they query records that contain it. **Note:** If you add, disable, or change the meaning of a Quick Code, you must log out and log back in for your changes to take effect.
6	Click Save on the Toolbar.

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